SECTION III

LESSONS LEARNED

PREVIEW OF SIGNIFICANT LESSONS LEARNED

There is an expanse of good information in this lessons learned section of this report. Many of the areas covered can save another SSEB time, money, and enhance personnel morale if it is given the proper time to review them and institute what can be used.

Of particular significance and impact are the following:

1. Proper scheduling of the evaluation is performed in advance.

2. Ensuring holidays and weekends are not used for work, even if schedule slippages occur.

3. Up-to-date equipment and facilities is utilized.

4. Adequate training and training packages are available, especially for those without SSEB experience.

* 5. The people that generate the Statement of Work should participate as evaluators.

6. That past performance points of contact are protected from name and contract disclosure.

7. Develop and clearly state/institute a command and control process and adhere to it.

8. Clearly publish the review process with appropriate verbiage defined, and ensure that an appropriate number of reviewers are on hand.

9. Ensure an entire administrative staff exists at least one month prior to initiation of the evaluation and that funds are available and controlled by this one group.

10. Open the Cost proposal (except, perhaps, the bottom line total) to everyone on the SSEB as are the other proposal volumes to ensure appropriate and accurate crosswalk of facts and evaluations.

Lastly, and not specifically addressed in this section's issues, is a recommendation that a library of "lessons learned" and "how-to-do" is established for the Acquisition and Source Selection processes.

Although there is an appearance of significant "show stopping" problems in the lessons learned issues, the LOGCAP Source Selection Board lived with, worked around, worked through and solved the problems encountered to successfully complete the selection process without a protest.

SOURCE SELECTION OPERATIONS: Covers establishment of the board, leadership, management, scheduling, time management, preparatory training and board administration actions.

1. **ISSUE**: Poor and untimely organization of the Source Selection Board (SSEB).

DISCUSSION: The LOGCAP Source Selection Evaluation Board was a composite board drawing members from a diverse group of organizations. One of the problems that the make-up of the board presented for the SSEB leadership and advisors, was the short amount of time prior to receipt of proposals that the board members became available. There was an excessive amount of personnel and administrative turbulence organizing the Source Selection Evaluation Board. Some evaluation members had less than two day's notification before they needed to arrive and begin reviewing documentation. Most were experts in their field, but had never participated on an SSEB. They did not know what to expect and in some cases, did not even have the benefit of seeing the documentation (SOW and sections L and M of the solicitation) before they arrived. Part of the problem resulted from not having brought the same community of people and their supervisors into the process to participate in generating the Statement of Work (SOW) requirement. Another part of the problem, was the late start organizing the board. HQ AMC and the SSEB Chairperson first had to determine what coverage was required and then messages were sent by AMC to the various ASCCs, major subordinate commands and agencies. Selection of people within their own commands took too much time; in some cases, responses were not originally received and required follow-up phone calls by the newly formed Project Manager in AMC. As people were identified, the SSEB Chairperson and Administrative Officer attempted to E-Mail the SOW and sections L and M to those representatives. Several messages providing administrative and TDY guidance were also sent. Compounding some of the above problems, were the changes/substitution of named personnel which meant trying to resend the required information. People that were selected at the last minute did not receive anything until they arrived. Later on, we learned that some people did not have E-Mail capability or that it was limited to the extent they could not read the documents we furnished. The Chairperson's intent was to have two expert people available for each element in the SOW. Because of the turbulence and lateness described above, we ended up having anywhere from one to four people covering an element. There clearly was not enough time to resolve all of the problems and issues that were identified in the pre-evaluation time period, nor to permit adequate source selection training of the SSEB membership.

RECOMMENDATION:

a. All areas of expertise (and then people) should be identified before the SOW is generated.

b. Management from all those areas should be part of the requirements approval process and should select representatives to actually participate in the SOW and cost estimating preparation.

c. Those managers should also appoint the same representatives that wrote the requirements/SOW to the SSEB.

d. The list of evaluators should be finalized and unchangeable (except for emergencies) at least 30 days and preferably 60 days before the board needs to convene.

e. If the make up of the SSEB is to be of a composite nature, especially if the PM organization does not provide the majority of members, allow extra time for members to familiarize themselves with the solicitation, and prepare for thorough source selection training.

f. All modes of communication need to be identified for each person/evaluator so information can be furnished in time to prevent transportation, housing and evaluator function problems.

g. A larger group than three people should be available for planning and set-up of the Evaluation Board and facilities. This is specially significant if the majority of the board comes from outside of the Source Selection area, with attendant TDY related needs.

2. **ISSUE**: Incomplete distribution/reception of final approved SOW and accompanying amendments.

DISCUSSION: Although the SOW was transmitted electronically to numerous Commands participating in the Source Selection Evaluation, many evaluators arrived with outdated versions and amendments. Some evaluators did not have the capability to receive the SOW via electronic data transfer means. Hence, some members arrived unprepared and there was initial confusion in the evaluation process when IFNs were being written based upon difference versions of the SOW. This was corrected over time, but certainly affected morale and wasted time.

RECOMMENDATION: Ensure, by whatever communications means possible, that each evaluator has a copy of the latest SOW and amendments prior to arrival and certainly before start of the evaluation. Push to incorporate all SOW changes and finalize the document early.

3. **ISSUE**: Line of authority and control of SSEB members became untenable.

DISCUSSION: Evaluators were dispatched from various commands throughout the world. As a result, they were never under formal direct control of the SSEB Chair. The lack of direct authority and control over personnel participating on the Board created problems, particularly in the area of administration. In some instances, people refused to follow directions given by the Chairperson because they felt that their status was exempt from doing so. When a recall was

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initiated, some individuals ignored the recall and remained at home for the holidays, while a few dedicated individuals returned to work as ordered and gave up most of their holiday. Poorly contributing team members stayed too long; they should have been removed sooner. Although some people were dismissed for other reasons, it was necessary to hold as many people as possible to prevent a restart. The problem resided in not being informed, before arrival at the SSEB site, that a rating or other reporting instrument would affect their future careers.

RECOMMENDATION:

a. A prepared "performance objectives" form for signature by each evaluator, should be available for handout when they arrive specifying conduct, operational and evaluation requirements during the evaluation process.

b. The SSEB Chairperson should be permitted and be responsible for submitting an "input" appraisal on each evaluator and Factor/Sub-Factor Chairperson.,

c. Replacement of members should only be required in extreme circumstances and be supported by the evaluator's home station. This disruption must be minimized. Should a replacement be required, the home station should have a back up person (preferably with acquisition experience) named and ready to immediately step in.

4. **ISSUE**: Multiple guidance and conflicting directions.

DISCUSSION: The SSEB had everything being reviewed by the SSEB Chairperson, Acquisition Center Advisors, Legal Advisor and Contractor Advisors. As such, a funneling or bottleneck occurred The compressed schedule exacerbated the process where ques-
tioning, direction and even rewrites/changes to evaluator documentation took place by these people. Asking a question either meant receiving an answer that may differ from the other review people or would mean a delay if those review people attempted to coordinate a response. Changes to documentation were made by one review person directly with the evaluators, bypassing the Factor or Sub-Factor Chairpeople. Much time was wasted and delays caused by conflicting guidance, rewrites and re-reviews in this process.

RECOMMENDATION:

a. The process/schedule needs to be slowed down to allow appropriate coordination among all concerned.

b. The review process needs to be spelled out in writing, added to the training, and carried out consistently throughout the evaluation process.

c. The advisors need to spend more time or be dedicated during the last two thirds of the evaluation process to provide coordinated and consistent guidance and direction to free up the review process

5. **ISSUE**: Lack of clear definitive guidance or lack of appropriate evaluation guidance in the preparation of forms, reports, and conduct of the evaluation.

DISCUSSION: Overall, there was a lack of or conflicting guidance concerning the conduct of the evaluation and the preparation of the various documents (IFN Forms, IFN Evaluation Forms and Source Selection Evaluation Reports) critical to the evaluation process. There was little clear definitive guidance on what type of product was expected from the evaluators. When guidance was provided, it changed constantly, causing reworks and duplication of effort. The lack of a standard format to prepare documentation early on created a great deal of frustration among everyone.

Sufficient guidance covering evaluation criteria and discriminators for each Factor would have greatly enhanced the evaluation process. The evaluators were not given any initial guidance pertaining to "qualifying words to use" and their associated meanings relative to Offeror proposals. For example, the difference between GOOD, BASIC, ADEQUATE, CLEAR, etc. There was also a disconnect between the Factor teams as to which words should be used and their appropriate meaning. Consequently, the various teams interpreted the words differently and caused confusion during the combined roll-up ratings for each Offeror.

Certain words that are used in describing a plan can have different levels of meaning to different people. It was not until after the evaluations had been written that the reviewers decided that they needed to look for certain words in the evaluation that could quantify the evaluation. This forced the evaluators to rework the evaluations, including the required verbiage.

A reference sheet was provided after the initial evaluation was completed that defined the criteria for "understanding of the requirement", "feasibility of approach" and "completeness" in a proposal. It would have saved a lot of time if that reference sheet had been provided to the evaluators at the start of the evaluation to help them quantify their written reports. It also would have helped the evaluators to ensure that they had included the required words that the reviewers were looking for. The RFP did provide evaluation guidelines and guidance, however, it was extremely wordy and confusing.

RECOMMENDATION:

a. Prior to an evaluation, all members of the board should be given a brief handbook to include general guidance, definitions, an acronym list, useful verbiage, required forms to be prepared and

examples which can be used as a reference when conducting the evaluation.

b. The handbook discussed above should also be integrated into formal training for all board members. The formal training should use case studies or prepared sample sections of proposals to actually take the evaluators through several types of reviews. The "practice" session would be extremely valuable for first time evaluators.

6. **ISSUE**: The entire evaluation schedule was too demanding and painful.

DISCUSSION:

Some specific examples were: (1) Christmas and New Years leave was cut short; (2) briefing was held for a full day on a Saturday; (3) travel time was required on Saturdays and Sundays, (4) work was requested on several holidays and most weekends. In short, the entire evaluation process schedule was destructive to health and home. After looking at the end result, there is no reason the evaluation process could not have been stretched out 2-3 weeks, saving overtime money and not hurting the people and their personal lives.

RECOMMENDATION:

a. Put realism into the schedule, mandating that holidays and weekends are not to be worked.

b. Briefings and travel should only be done during the business day and not on people's personal time.

7. **ISSUE**: Poor work schedules of some evaluators and poor management thereof.

DISCUSSION: Due to the time pressures exerted on the acquisition process by acquisition streamlining and the aggressive Procurement Lead-Time (PLT), goals set by the CECOM Acquisition Center, the amount of time allowable for the evaluation of proposals by an Evaluation Board was limited. While there are many approaches to achieving time savings during a source selection process, this particular issue is focused on the work schedules of the evaluators and management thereof.

The management (administration) of evaluator personnel and their time sitting "on the Board" (on duty at the work place) was poorly handled.

The evaluators generated raw reports and IFNs, and the Subfactor and Factor Chairs were responsible for review and consolidation of those reports and IFNs.

During the LOGCAP proposal evaluation period, many evaluators maintained a normal eight hour work day. It should be noted that

there were evaluators who worked a significant amount of overtime. To direct the focus of this problem moreprecisely, there were several evaluators in key leadership positions who consistently maintained normal working hours. Unfortunately, the responsibilities of these evaluators directly affected the documentation flow process of the evaluation.

The primary reasons included lack of understanding of the process (apparently; because it appeared that not enough time was allotted for coordination between the Chair, Contracting Officer and Legal to review and correct the evaluator's input); indecision on a standard process (there should have been some standard forms and/or format prior to the evaluation); and the limited availability of some Chairpeople, and failure to correct the situation (the Board and Teams were technically handled but never managed and corrective action was not effective to reduce the constant turbulence).

Additionally, the SSEB process calls for periods when evaluators are extremely busy, and periods when evaluators don't have much to do. There is no point in keeping people sitting around doing nothing when it isn't necessary. Many hours of overtime were wasted because evaluators were required to wait around while meetings were conducted after normal duty hours. Evaluators could have been given compensatory time during the SSEB board process, reducing the amount of overtime paid, increasing morale by letting TDY people see some of the local area, and increasing efficiency overall.

Communications from the top down kept failing or being changed. Meetings were called five minutes before they began. Holidays, weekends and extra hours worked were decided at the last minute, "on-the-run."

The main reasons for this occurrence are the short time allotted for the evaluation; the unique expanse of the program; and requiring so many people and differences in evaluating the proposals on LOGCAP vice a "system" buy or "standard services" acquisition.

RECOMMENDATION:

a.   More time to properly administer a large group is required for proper communications to reach everyone.

b.   Holidays and weekends should be considered off limits to work and should be planned into the schedule.

c.   A compensatory/leave/work trade must be established for the down period versus the up or compressed period.

d.   Allow evaluators to be released from the work site during periods when there is little or no workload.

e. Vest full line authority and responsibility in the SSEB Chairperson to discipline/remove non-productive, disruptive or non-complying evaluators and Factor/Sub Factor Chairpeople.

f. Communication of the responsibilities and expectations of the Factor and Subfactor Chair positions should be made extremely clear. The expectation that leadership positions will be held to the highest standards of dedication, scrutiny, and even self sacrifice should be strongly emphasized to potential Chairpeople. The time pressures of the source selection process necessitate that those board members in leadership positions be willing to put in all of the time required to meet established milestone goals and to be the role models to the evaluators.

8. **ISSUE** Little or no crosswalk of information between factors.

DISCUSSION: Due to the compressed schedule, there was little or no time to meet and discuss findings or information between Factor personnel. The two short moments this did occur, were very fruitful. One was a hallway discussion between the PRAG and Management Chairpeople where PRAG learned that there were other sub-contractors mentioned in the Management Volume that were not listed in the PRAG volume._ Another instance occurred, where technical Factor evaluators were asked by the Cost Chairperson to look at some sanitized cost material for cost realism and found that a change in that area was never mentioned in the technical portion of the proposal.

RECOMMENDATION:

a. Set aside at least three, four hour periods for Chairpeople and even evaluators to discuss findings that could help each other in their evaluation.

b. The cost team should not be isolated from the other teams, especially when cost realism is to be accomplished. Their integration would facilitate the cross checking of what is stated in the technical volumes and priced in the cost proposal.

c. A Cost team member should attend all oral presentations scheduled to ensure a cross check of what is being offered technically versus what is being priced.

d. A Cost realism briefing package should be made available for the Technical people containing an explanation of what cost realism is, their role in performing a technical evaluation for cost realism, and examples of how to accomplish this using the Statement of Work (SOW) and the Work Breakdown Structure (WBS).

9. **ISSUE:** Source Selection Board member training.

DISCUSSION: The majority of the board make-up, to include Factor Chairs, evaluators, and contractors had no prior experience concerning the Source Selection process. It is imperative that some useful training take place prior to the beginning of the evaluation phase. Without this training, inexperienced evaluators not familiar with the Source Selection process and approach, evaluate based upon their own experience and judgments which may be contradictory to what the SSEB Chairperson expected. This resulted in numerous rewrites and lost time early on in the process.

Members of the board were not given adequate training in preparation for the evaluation process. The training provided consisted of an outdated SSEB training film along with some general discussion about the process. The relative value of the film and brief training session was insignificant and did not properly prepare members for the task at hand. Evaluators learned through trial and error, in a self-help atmosphere, during the evaluation process. This created frustration and a loss of valuable time in evaluating the Offerors. The overall additional cost and time was a result of this deficiency. This could have been avoided by administering a sound, up-to-date training program and proper guidance.

RECOMMENDATION:

✡ a. A comprehensive training program (to include cost) for SSEB members should be provided prior to the beginning of an evaluation. The evaluation process should be addressed covering, at a minimum, the following items: steps of the evaluation review process, forms/reports to be used, adjective and other important verbiage to incorporate, software and hardware available, use of the chain of command and all other important issues impacting the board. All information and instructions necessary for an evaluator should be incorporated into an evaluator's handbook.

✡ b. The use of a sample proposal incorporated into a practical exercise for evaluators could pay enormous dividends once the evaluation process begins and also eliminate any questions they may have concerning "HOW" to evaluate each proposal. Training should include actual evaluation examples to include the forms and reports to be written. The Legal advisor should have the responsibility to prepare and instruct the exercise.

✡ c. Also, there should be much more explanation of the contents of Section L and M of the Solicitation and how they factor into evaluating the Offeror's proposal.

d. Board members should also be briefed on lessons learned from previous or other Source Selections in order to prevent them from making the same mistakes.

e. The training period should be scheduled by the Acquisition Center to allow sufficient time to cover all essential topics. This time block should be considered a top priority and mandatory.

f.   A cost realism briefing package should be available for Cost Factor team members from other agencies containing an explanation of what cost realism is, their role, all related evaluation forms, and practice examples. Perhaps, they could be trained using the intern training package for pricing or spend two weeks in the Pricing Office doing spreadsheets and analysis prior to beginning the SSEB.

g.   A past performance training session should also be prepared for members of the PRAG Team and a portion of this training should be provided to other teams to enhance their interaction.

10.   **ISSUE:**   SSAC/SSA Source Selection Training.

DISCUSSION: Upon reaching the SSAC/SSA level to brief board results, it was apparent that the majority of the SSAC members did not have Best Value Acquisition experience, nor a clear understanding of what their duties and functions were. SSAC members attending the initial briefing had not been provided with, nor read the Statement of Work prior to the briefing. The lack of understanding on their part could have caused a major delay in the contract award. It was necessary to provide the SSAC/SSA a walk through of the evaluation process which took place and the rational for the results. This special walk through training session provided the SSAC/SSA the necessary training for them to articulate the findings and rationale to the SSA.

RECOMMENDATION:

a.   The SSAC/SSA members should be identified early on and provided with the latest copy of the SOW. Upon receiving the SOW, a follow-up call to acknowledge receipt of the document will ensure that all members are prepared prior to the initial briefing.

b.   The Acquisition Center should provide the SSAC/SSA a read ahead package describing the evaluation process to include techniques and rationale. This can only work if the evaluation process is standardized with specific detail as to how board members performed their evaluation. With the knowledge of "HOW" the evaluation was conducted and the rationale for determining ratings, the SSAC/SSA would be better prepared to take on their responsibilities.

11.   **ISSUE:**   Need for Cost realism training for board members and DCAA auditors.

DISCUSSION: Since a cost realism audit is a relatively new procedure, it would be beneficial to explain to the auditors what the program is about and what we expect from them. It would also help the other teams in their evaluation interaction.

RECOMMENDATION:

a.   Training should be extended to the cognizant board members and auditors before, or once proposals are received.

b.   An alternative is to stagger receipt of the Cost proposal (from the other volumes) by one week. This would permit time to train DCAA without impacting the cost evaluation.   There could even be a day of overlap with receipt of the proposals.   Then the cost volumes could be walked through by the cost team, including the auditors.

or

A clause could be placed in the RFP requesting Offerors to submit a copy of their proposals directly to DCAA.   Auditors could be trained after having a week to look at the cost volumes.

c.   That DCAA will not start an audit without a formal request (letter, E-Mail) is a problem.   The DCAA liaison could possibly be involved in the SSEB training prior to receipt of proposals.   The DCAA liaison could then coordinate with the regional directors.   Once a DCAA office received the proposals, a cost realism audit could begin with a letter/E-Mail request to follow.

12.   **ISSUE**:   Administrative log/tracking procedure to review documents.

DISCUSSION: During the course of the evaluation process, documents were misplaced or reviewed twice by the same person, and status not appropriately logged.   This caused considerable confusion and tension among evaluators and reviewers.   There were at least four levels to review each document to include Factor Chairperson, SSEB Chairperson, Contracting Officer, and Legal representative.   The number of reviewers warranted a log to keep track of who has seen the document.

RECOMMENDATION: A log should be assigned to a clerical person dedicated to maintaining this information using a computer data base program.   No paper should be forwarded for review until that paper has been properly logged in.   Also, make up a routing slip for the various levels of review.   Have everyone review, through legal, then have the paper with all comments come back to the Factor Chairperson for approval before any changes are made.

13.   **ISSUE**:   Restricted use of the copy and fax machines by Board Evaluators.

DISCUSSION: The restricted use of the copy and fax machine resulted from the need to maintain security of proprietary information.   In many instances, it proved to be an unnecessary delay in the daily operation for the evaluators.

RECOMMENDATION: To prevent delays and maintain board security, instruct board members not to bring in or remove anything from the site building.   Someone should be assigned (door guard) to check all personnel entering and leaving the facility for any such proprietary information.

14. **ISSUE**: Not knowing the nature/structure of the SSEB early.

DISCUSSION: Staffing requirements of the Source Selection Board need to be dealt with early on in the pre-solicitation phase. It must be determined as soon as possible whether the board will be staffed locally or from various outside commands/agencies. This information will facilitate the direction of administrative procedures. Starting late and injecting different procedures impacts the support provided.

RECOMMENDATION: Know the nature and structure of the SSEB early; provide at least one to two months in advance to set up funding, and in the situation of having outside members, to set up lodging and transportation.

15. **ISSUE:** Funding was not uniform, consistent and even available at times.

DISCUSSION: The funding was provided by AMC for the following areas:

   a. A block of money was forwarded in advance of the board convening to the Acquisition Center, CECOM, for salaries and travel of Acquisition Center personnel in preparation for solicitation.

   b. Money was transmitted by Military Inter-Departmental Purchase Request (MIPR) to the Logistics and Readiness Center, (LRC) CECOM, for travel by CECOM board members; overtime worked by all board members, and supplies. The overtime was the only factor that required additional administrative time since a MIPR had to be initiated by the LRC Budget Office for each non-CECOM participant for overtime dollar reimbursement.

   c. Travel funding for (24) non-CECOM members was held at the AMC Budget Office level. Processing all expense vouchers (a series of up to five extended TDY vouchers per individual) resulted in extra mailing/handling expense and increased the length of time for voucher payment to the individual.

RECOMMENDATION: Funding for a joint command/agency board should be managed at the board location for the optimum efficiency and uniformity of service to all board members.

16. **ISSUE**: Lodging was remote from the evaluation site.

DISCUSSION: An important factor is to have the members assigned on TDY centrally located near the SSEB site. Fortunately, guest quarters were available at the Fort Monmouth Lodging Center to accommodate the number of members on TDY status. The near co-location of these board members resulted in savings on rental vehicles with an approximate ratio of three members to one rental car. Had they been closer to the Evans evaluation site, more of a savings could have been realized.

RECOMMENDATION: That lodging be established for TDY personnel on the SSEB in one close location to the SSEB site.

17. **ISSUE**: The need to provide early administrative support.

DISCUSSION: Designation of the administrative support staff
(administrative officer, contractor support and secretaries) occurred
only days before the SSEB convened and was only partially staffed at
that time. For example: a requirement existed for two secretaries.
Only one was available at the start date and the individual became
seriously ill within two days. There was a short wait for the second
secretary. The arrival of the replacement secretary occurred a month
into the evaluation.

RECOMMENDATION: Designate the administrative support staff at least
one month before the SSEB convenes. This gives the administrative
staff time to set up and put all procedures into place to accommodate
the SSEB team evaluation members.

18. **ISSUE**: Inadequate planning time for post-solicitation
activities. Could only anticipate what administrative records would
be required.

DISCUSSION: When the evaluation was first completed, we started
planning what after actions needed to be done. This required guess
work that delayed the completion of post award adminis- trative
actions. Many of the activities could have been completed earlier if
we did not need to first think of the actions and then how to
accomplish them early establishment of critical adminis-trative
records for reporting purposes is needed. Knowing what type of
administrative data will be requested for reporting purposes can
facilitate immediate delivery upon request and prevent stretching out
the board's close-out.

RECOMMENDATION: Details pay off! Plan in the beginning for
activities necessary upon completion. Anticipate what it will take to
accomplish the final taskings; awards, ratings and recognition
factors. Keep itemized accounting of operating expenses; travel,
supplies, overtime, etc. This will facilitate the reporting process.
Make sure you know if Appraisals/OERs or input to them will be
required. Determine an award structure early on, and avoid guessing
later. (This could be driven by the level, nature, and length of
individual boards).

19. **ISSUE:** Limited availability of supplies to begin the evaluation.

DISCUSSION: At the start of the SSEB evaluation, CECOM funding was
utilized since AMC funding had not been received. Purchasing of
supplies from the CECOM supply store was limited since the operating
budget had not yet been approved. This resulted in the ability to
purchase only minimal supplies at the beginning of the board. As soon
as the funding became available from AMC, the procurement of supplies
was easily facilitated. Until that time, supplies were limited in the
local CECOM supply store as well as funding for using a VISA card for
outside purchases.

RECOMMENDATION: Ensure funds for supplies are on hand at least 15-20 days prior to the SSEB team evaluators arriving.

20. **ISSUE:** Poor board personnel accountability.

DISCUSSION: It is important to maintain accurate accountability throughout the period that the Source Selection Board is convened. Accurate records need to be kept for the total budget account report, final budget number, reimbursement, and security. During the conduct of the Board, a sign in/out procedure was implemented to track hours worked (to include overtime) and for security reasons. In some instances, there were military personnel who felt that they did not need to sign in/out due to their military status. As a result, final budget numbers and overtime hours had to be estimated for military personnel.

RECOMMENDATION: Strictly adhere to a mandatory sign in/sign out for all board members to include military personnel.

Statement of Work and Section L and M of the Solicitation: Covers issues impacting either the SOW, Section L or Section M or any combination of the solicitation.

1. **ISSUE:** Oral presentations versus the written proposal.

DISCUSSION: While good for evaluation purposes, oral presentations present a problem to the Offerors. According to some of the Offerors, the oral presentation is much more costly and time consuming for them to prepare. In all cases, they need to have a written proposal that is then translated into a script with charts and art work. This means work above and beyond the proposal itself. In addition, one Offeror claimed they spent $100K in "charm school" lessons for the presenters just to prepare for the orals. We also noticed that more explanation in sections L and M of the solicitation may be required discussing what to focus on and how the orals were to be used in the evaluation.

RECOMMENDATION: The cost to the Offerors and added work to both Offerors and the Government should be re-evaluated.

2. **ISSUE:** Need for SOW clarity of requirements, definitions and specifics.

DISCUSSION: The content and the organization of the SOW caused confusion and frustration for evaluators. The SOW requirements were stated in very general terms, not requiring or drawing a level of detail from the Offerors that evaluators need to fully understand and evaluate the Offeror's approach to the require-ment. There was also a considerable amount of repetitiveness in the SOW.

Many evaluators expressed frustration concerning the utilization of a broadly written SOW to evaluate Offeror's proposals in specific factor/element areas:

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a.   Lack of appropriate or <u>common wording</u> to solicit critical information hindered the evaluation (i.e., "identify sources of" versus "provide a list").

b.   Lack of detail for the Offeror concerning specified Government sources of items to ensure the Offeror's understanding of the requirements (i.e., AFCS drawings, TOGS specs, and TCMS software were mentioned but not described).

c.   Information concerning element areas lacked specific detail causing confusion for Government and Offerors in determining the proposed application of SOW requirements/ statements (evident in the areas of supply and supply support, reparable management, "excess equipment" management, and retrograde of equipment).

d.   Defining the "U.S. Army CREST Team" and its responsibility could have enhanced the responses from Offerors.

RECOMMENDATION:

a.   The Statement of Work elements need to be more defined. This should aid Offerors in preparing their responses more accurately and with uniformity. This would also aid the evaluator in reviewing the proposals. Obviously, the more precise the question, the more precise the answer should be. This would facilitate evaluation of submissions to the various elements and consequently aid in developing an overall evaluation of the proposal.

b.   Also, recommend that a special team develop the SOW for better continuity. Use technical people to write the requirements in the SOW that require technical responses. Involve as many people as possible from the SOW writing team on the SSEB evaluation team.

3.   **ISSUE**: Need for additional SOW requirements.

DISCUSSION: The SOW did not contain some necessary requirements (according to evaluators, expert in their fields) to extract a complete and detailed proposal (from Offerors) in several areas of logistics. These areas include a requirement to implement velocity management techniques; the prevailing supply management software; SARSS-Objective. The use of LOGMARS and Radio Frequency (RF) technology for tracking purposes, although mentioned, did not include it as part of "warehouse operations"; and the Automated Manifest System (AMS), used at Central Receiving and Shipping Points, was not mentioned at all. It also appears that critical information in the areas of quality and cost could have enhanced the evaluation of this particular solicitation.

RECOMMENDATION:

a.   The SOW should be a concentrated effort which includes representation from the major training centers and key field locations such as Fort Bragg and Fort Hood. A combination of the schoolhouse

and field experts shoud be generating specific SOW requirements to ensure that contemporary support techniques are required and discussed.

b. A Work Breakdown Structure (WBS) should be developed based on the SOW and provided in the Solicitation in a flowchart form to the Offerors. The Offerors can then structure their cost data by WBS, starting at the third level and rolling up to a summary or level one.

c. The SOW should clearly require a quality control plan that complies with international standards. Criteria should be added that specifically states this to the Offerors.

4. **ISSUE**: Repetition/redundancy in the SOW.

DISCUSSION: Redundancy and repetition of what did exist in the SOW, caused it to be needlessly complex and confusing to evaluators. The SOW was set up to address numerous tiers of plans (worldwide, regional, country) each covering the same elements. This created confusion when evaluating Offeror proposals concerning each type of plan. This duplication also required additional paper. At least 30 extra paragraphs in the SOW were the "same" as in other sections; that, by consolidation, could be eliminated. There were other subtle differences and these were the ones that caused a back and forth look between sections to evaluate.

RECOMMENDATION: A consolidation of the SOW would be more user friendly and eliminate the duplication problem associated with the current version.

Each of the elements concerning a type of plan could have been consolidated in one section with definition of the element. Restructuring the SOW by elements, with sub-paragraphs referring to each type of plan an element pertained to would be pertinent. Also, a matrix/checklist and WBS could have been prepared which could have been utilized by evaluators in assessing the proposals.

5. **ISSUE**: Using standardized colors for original and change page submittals.

DISCUSSION: All original pages in the proposals should be white. This should be specified in section L of the solicitation. Thereafter, a directed color scheme for Offeror's to submit change pages to the proposals should be specified. For example, the first set of proposal change pages would be blue and the second set of changes would be yellow. Different color change pages enhance the organization and posting of changes to the original proposals. Not submitting change pages on colored paper makes it difficult to distinguish and control the Offeror's original submittals from changes. Hence, evaluators have a difficult time determining whether they have already reviewed a page.

RECOMMENDATION:

    a.   Develop standardized original and change page colors for all Offerors to use.

    b.   Explicitly direct the color schemes in section L of the solicitation

6. **ISSUE**: Shortage in the number of proposal copies submitted by Offerors.

DISCUSSION: Copies of proposals had to be made so that all evaluators had access when needed. The number of proposal copies submitted by the Offerors should be in sufficient quantities to accommodate the number of evaluators present. Copying proposals caused additional problems in the administrative area and wasted valuable time.

RECOMMENDATION: Depending on the number of evaluators to be utilized, sufficient copies of the proposals (or sections) should be available from the beginning so that the reviewers do not have to wait for a copy to become available for use nor have to share a copy with another member of the board. Offerors should be directed to prepare additional copies once the make up of the board is determined.

Evaluation Process: Addresses issues that impacted the evaluation process itself.

1. **ISSUE**: Different proposal organizations and layouts.

DISCUSSION: Many of the evaluators jumped right into evaluating the Offeror's proposals against the SOW requirements before giving the proposal an <u>initial cursory review</u> for organization, layout, and structure. As a consequence, some IFNs were generated that were later found to be unnecessary (and were eliminated) due to the fact that information sought was contained in another section of the proposal.

RECOMMENDATION:

    a.   Evaluators should first read each proposal thoroughly to get a flavor of its organization, structure, information and layout prior to evaluating them against the requirements. Each proposal should be checked against the latest version of the SOW.

    b.   Section L of the solicitation should instruct the Offerors to cross reference their proposal paragraphs with the SOW and note that in a margin of the proposal.

    c.   It may be wise to also instruct the Offerors in section L not to assume that if the information is in one area/volume that the correct people will see it. They should, perhaps, repeat that information if they feel it is necessary for a different team, using a different volume to evaluate.

or

    d. It may be more apropos to have the teams cross over into all the volumes, including cost, to make a "thorough" evaluation.

2. **ISSUE**: Standardizing the IFN/IFN evaluation forms, reports and numbering system.

DISCUSSION: The IFN Form and Evaluation Form was not finished prior to the start of SSEB. This was due to the compressed schedule initially established. There were format corrections made. These changes caused rewrites to make all documents uniform and unambiguous. The numbering system used was agreed upon by the SSEB Chairperson, PCO/Legal Advisors and Factor Chairpeople.

RECOMMENDATION:

    a. There should be a standard form established for Cost, Technical and Management and a modified form for PRAG. This should be established by the Acquisition Center and agreed upon by all users. The forms should be made and issued on a disk in a read only version where the format cannot be changed when used; and renamed to the appropriate Offeror with the correct IFN numbering sequence. This would solve much of the rewrite problem caused by format changes.

    b. The use of all forms should be covered during the initial training program. The scope, format and criteria should be set up before the board covenes to eliminate any confusion.

    c. There should be a standard system established (by the Acquisition Center) for numbering IFNs.

3. **ISSUE**: The document review process was too lengthy with a shortfall in reviewers causing a bottleneck and delaying answers to all questions.

DISCUSSION: Documents that are submitted for review were not turned around in a timely manner. There were five to seven reviewers to 30 evaluators, but not all were full time participants. This created a bottleneck for reports and forms flow. Rewrites of many reports and forms were necessary due to the nature of this process. The rewrites are a necessary by-product of this process to eliminate conflict and to insure
that rating terminology is not intermixed in the evaluation documentation. The flow of the report process, set up by the SSEB Chairperson, was a workable plan. As the different groups exercised this plan, deviations occurred creating additional delays. The various reviewing groups did not always coordinate among themselves. All reports should have followed the plan; from evaluator to Factor Chair to SSEB Chair to Legal/PCO Advisors and then returned for corrections. This did not always happen. The PCO and legal advisors were not always at the Board location due to other assignments/responsibilities. They were present, but sometimes didn't

get to the evaluation site until the afternoon and usually stayed into the night reviewing documents. By that time, some evaluators had departed for the day, not having their questions answered. They were usually answered the following day. Evaluators felt that there should have been more full time reviewers without the part time impact. Close coordination between Factors is also critical throughout the evaluation process.

RECOMMENDATION:

a. Establish a sequential flow for all evaluation reports and documents to follow without exception.

b. Allow changes for Legal and PCO requirements and ensure that a good editor is in the flow.

c. No substantial changes or recommendations should be done without Factor Chairperson approval.

d. The PCO and Legal Advisors should be on site during normal work hours to answer any questions and to speed up the review process.

4. **ISSUE:** Utilizing proposal "advantages" and "disadvantages" for briefing charts and reports.

DISCUSSION: During the course of the evaluation, Offeror advantages and disadvantages were noted and incorporated into the evaluation reports. These advantages/disadvantages were also used in charts for briefings at various intervals. As a result, the advantages/disadvantages listed in briefing charts were being used as trade offs by the SSAC (at first) to compare one Offeror to another. The charts listing advantages/disadvantages for each Offeror was a misnomer and should never have been utilized for the purpose stated above. The briefing charts should really have depicted what exceeded the SOW requirements, what was good in meeting those requirements, and what was deficient in meeting SOW requirements. The fact that an Offeror was deficient or exceeded the requirements is the critical point to convey when briefing results.

RECOMMENDATION:

a. During the training period for board members, it should be stressed that when evaluating an Offeror's proposal, it must be noted whether the Offeror met the requirement, exceeded the requirement, or was deficient. Language to this effect will eliminate any misinterpretations of advantages/disadvantages.

b. The terms advantage and disadvantage should be changed to "contributors" and deficiencies.

5. **ISSUE:** Protection of past performance "points of contact" (POCs).

DISCUSSION: There needs to be a way of protecting the names (and associated contract numbers) of people that provided past performance input. We had an incidence during an IFN request where the Offeror went back to the POC that supplied the PRAG team with information. That POC recanted the information and was upset that the information was reported back to the contractor. The PRAG team had not mentioned the person's name in the IFN, but the Offeror knew that they only provided one name against the contract described in the IFN. If this is not corrected, POCs will no longer respond to a PRAG request (as we have begun to see).

RECOMMENDATION:

a. In section M of the solicitation, inform perspective Offerors that the POCs names and contract numbers will in no way be divulged, including in a freedom of information request when a deficiency is noted. Also, mention that other POCs will be sought beyond the Offeror's submitted names.

b. Sanitize any reports that contain the evaluator's names and contract numbers.

6. **ISSUE**: Physical and information security was a major problem throughout.

DISCUSSION: The facility, equipment and personnel habits all worked against having a secure evaluation. Doors were found open, disks were being removed, paper copies and faxes were being sent to home stations all making for an easy breach of security. Rules and notifications were sent to all members several times, but a constant unsureness persisted. The building was accessed by the building owner's people (Acquisition Center), cleaners, maintenance people and prior SSEB people who still had equip- ment/files in this location. Consequently, hand receipted equipment transferred to the board site was never secure.

RECOMMENDATION:

a. Impose strict limitations on what is brought in and out of the evaluation area.

b. Assign a person to ensure that everything used by the board has a signed sub hand receipt (including disks).

c. Better locking facilities are required.

d. Ensure no one enters the premise while the board is active and if maintenance or support people enter, they are attended to on a full time basis.

e. Do not permit personal notebook computers nor passage of personal or home station E-Mail from the evaluation site.

FACILITIES: The two most important issues impacting facilities used in an SSEB are discussed.

1. **ISSUE**: The poor building/facility condition not only had an impact on the Source Selection process, but was a poor presentation to outside board members.

DISCUSSION: The building chosen for the SSEB was approximately 50 years old and some things did not work properly, including heat and A/C. The building heat could not be regulated below 85 degrees. The heat could not be turned off if the rooms became too hot. The A/C was broken and some windows were blocked by outside structures. The telephone system was old and out of date. The telephone would ring in some offices and not in others. There was no paging capability or inter-communication ability between offices and team members. The copy machine and fax was restricted to official SSEB Board information and use. Room and building keys were issued to Factor Chairs but were not effectively controlled to insure all members had access at all times. The building security could have been better.

RECOMMENDATION: .

    a. Use a more modern and cleaner facility.

    b. Ensure adequate planning/time to prepare the building for use; for example, servicing all equipment that will be used.

    c. Have a facility that can accommodate large teams; with conference rooms and communication that works.

    d. Security could be enhanced with the use of cipher locks.

2. **ISSUE:** Electronic infrastructure and ADP training for evaluators.

DISCUSSION: The use and manipulation of electronic data during the Source Selection process is critical. The lack of an appropriate and effective electronic infrastructure was evident during this solicitation. Electronic infrastructure refers to the internal site ADP system architecture to include hardware, software, and communication (voice/data) lines.

    The current CECOM Acquisition Center site is a temporary facility used for numerous acquisitions. As a temporary facility, an electronic infrastructure was absent. For every acquisition performed at the facility, a form of electronic infrastructure is created from the start. The hardware utilized to establish the infrastructure is acquired through begging and borrowing from other organizations. The quality of the equipment obtained is usually out dated, inadequate, and perhaps, problem ridden. The creation of an electronic infrastructure is both time consuming and costly. An effective, and supportive electronic infrastructure would be one that is already in place (dedicated to a particular facility) made up of adequate hardware (sufficient storage, memory, processing speed,

communication capabilities and printing) configured in a LAN, sufficient quantities of hardware to support board make-up; and a standard software package provided to access the local area network or desktop. The use of a LAN would facilitate the exchange of data among board members and enhance evaluation roll up capability by various functional levels.

A color printer was also needed to print evaluation briefings (initial, interim, final). This particular function had to be accomplished at another site due to the absence of a color printer at the SSEB site. This presented a problem, especially when last minute changes needed to be made.

The type of software (LAN or desktop) utilized during the evaluation process is also critical. It is imperative that word processing, spreadsheet, and data base software be provided/ available to board members to perform their tasks (evaluation reports, tracking, and analyzing cost inputs).

Although ADP support was available initially and upon request, dedicated and adequate electronic tools would decrease the amount of ADP support currently necessary.

All board members need to be cognizant of the various electronic tools available to perform their task. It was evident that a few board members were not computer literate and additional time was needed to instruct these individuals in operating procedures and equipment characteristics.

RECOMMENDATION:

a. The Acquisition Center should establish a dedicated facility equipped with an electronic infrastructure. The dedicated infrastructure should consist of a LAN with adequate printer support and sufficient voice/data lines. The infrastructure should also provide access to the electronic bulletin board for use by the assigned Advisors, (KO Specialists and Legal people). The infrastructure should also provide limited access to the Internet for E-Mail exchange (for SSEB purposes only, such as PRAG mailings).

b. The Acquisition Center should establish/update an ADP bank with various types of electronic tools and equipment to support the Source Selection dedicated site and other sites under their auspices. Dedicated fax capabilities for the PRAG group would make a significant impact.

c. Training for all members on the use of computers and SW available is recommended and should be incorporated into the formal SSEB training package.

MORALE AND WELFARE: This area contains impacts to people on the SSEB, predominantly those that were on long term TDY to participate.

1. **ISSUE**: Interference of holidays and holiday season with Source Selection Board conduct.

DISCUSSION: It is important to factor in holiday/vacation periods into the performance time frame of a SSEB. Throughout a fiscal year, there are standard holiday/vacation periods in which personnel plan their leave/vacation. Weekend periods should also be taken into consideration when planning for a SSEB. Requiring personnel to forfeit their weekends and holidays contributes to a hostile work environment and breeds poor performance.

RECOMMENDATION: All weekends and holidays should be factored into the planning schedule without deviation. Any slippage in schedule should be done without using weekends and holidays to get back on track.

2. **ISSUE**: Establishment of performance standards for SSEB evaluators.

DISCUSSION: It appeared that numerous evaluators did not apply themselves 100% to the task. The inadequate performance/ utilization of several evaluators impacted the evaluation process and end product. The board was comprised of numerous individuals from different commands and agencies, including military personnel. Many felt that the SSEB leadership had no control over their performance/actions. As a result, many directives issued by the SSEB Chairperson were not adhered to, which impacted planned milestones.

RECOMMENDATION: That the SSEB Chairperson be given formal direct control over all participants during conduct on that Board and that each Factor Chairperson be counseled of his/her duties during conduct of the board. Each Factor Chairperson in turn should counsel each Factor member on their duties and responsibilities. Make each individual aware that their performance during the Board will be evaluated, documented and provided to their organization for appropriate action (appraisals, OERs, etc.). Doing this, will provide the Chairperson greater managerial control over board member's actions which will enable tasks to be accomplished efficiently and on schedule, while preferably not requiring removals from the board.

3. **ISSUE**: Availability of decent quarters.

DISCUSSION: There were several complaints concerning the condition of rooms provided board members at post housing. Some rooms were in better condition than others, but general statements about dirty stained furniture, poor cleaning, and lack of amenities were prevalent. Attempts were made to switch into better quarters and after a meeting with housing management, this occurred for most members. The environment within post quarters was also inadequate. There were numerous complaints of loud noise in the

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evenings, shouting, broken washers, water remaining on floors and transient traffic.

RECOMMENDATION: Personnel on long term TDY should be afforded the best quarters available. Billeting should be notified far enough in advance in order to block out such rooms for SSEB members. If this isn't possible, then statements of non-availability should be afforded those travelers so that appropriate quarters can be found. We need to remember that these "outside CECOM" Government workers are supporting us and the impression they are left with will also be mentioned at their home stations.

4. **ISSUE**: Delay of travel/per diem funding reimbursement.

DISCUSSION: Travel/per diem funding reimbursement delays occurred because the command given the overall acquisition responsibility did not control the funds for travel/per diem reimbursement. As a result, vouchers had to be mailed to another location having the funding responsibility which caused a 30-45 day delay. If there were errors made in the preparation of the form, the cycle became even longer. The reimbursement of rental cars was handled upon completion of TDY orders. Many board members were away from their families and delays in reimbursement severely impacted their personal budgets and living expenses.

RECOMMENDATIONS: The command given the acquisition responsibility and conduct of the SSEB should be given control/responsibility of funds for travel reimbursement and per diem. This would have saved time, prevented personal/family impacts and increased the effectiveness of board members.

5. **ISSUE**: The disconnect of board members from home station communication, which includes E-Mail, caused a problem with evaluators and their home stations..

DISCUSSION: Participation on a SSEB consists of considerable time away from regularly assigned duties. Board personnel are still expected to remain "plugged in" with their parent agency; that includes keeping up with incoming mail and electronic correspondence with their home organization. The inherent nature of the Board imposes many restrictions on evaluators due to maintaining board security of Acquisition Sensitive and Proprietary information. There was also a suggestion by board members that a forwarding address be provided to each of them.

RECOMMENDATION:

    a. Establish change of address/forwarding address accounts for each SSEB member from outside agencies.

    b. The parent organization can provide the SSEB members with laptop PCs having mobile communication software (E-Mail, fax/answer machines) which could be utilized by members in their quarters after

hours. They can provide a charge account to use these PCs if necessary.

c. If the person selected for an SSEB isin a key position in their home organization, that organization should temporarily select a replacement for the board member until the board is terminated.

6. **ISSUE**: Shortfall on personal services information for the surrounding Fort Monmouth area.

DISCUSSION: This particular Source Selection involved people from their various commands spending a considerable amount of time away from home station and individual personal services such as medical, dental, banking, etc. The information provided in the welcome packet was inadequate or outdated in the coverage of the areas mentioned above. For example, the cashing of Government travel checks became an issue where it took two full days to find a place that would cash such checks issued by another command. As it turned out, procedures were in place to cash Government travel checks at any "Fleet Bank" but this was not covered in the welcome packet. Also, numerous members needed to seek medical and dental assistance. It would have helped to supply a list of such local services.

RECOMMENDATION: The command hosting the SSEB should review/update the current welcome packet and ensure that the packet includes critical personal services such as medical, dental, banking, etc. The packet should cover procedures, places and services for military and civilian personnel, if different.

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